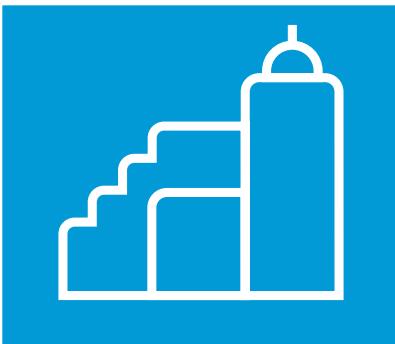
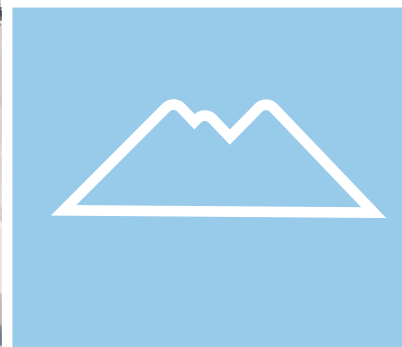
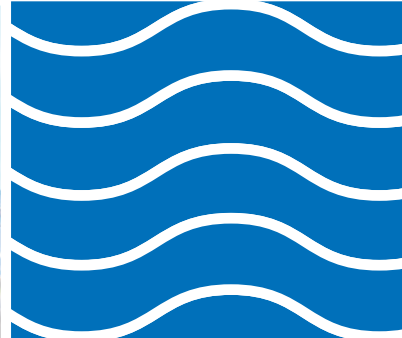


EAST BAY  
MUNICIPAL  
UTILITY  
DISTRICT

# economic impact 2026 summary



between FY 2023-2025:



**\$4.8B**  
Regional  
economic  
output

**6,300**  
Average  
annual jobs  
supported

**\$1.50**  
Regional  
economic  
activity for every  
\$1 spent

# Essential service. Lasting regional value.

Every ratepayer dollar supports a system that delivers safe water, protects San Francisco Bay, and strengthens the East Bay economy. We create value in five connected ways.

## How We Create Value



### Investing in infrastructure and resilience

Capital projects that modernize aging pipelines, treatment plants, and pumping facilities while preparing our systems for climate change, population growth, and seismic risk.

### Operations driving the local economy

Daily water delivery and wastewater treatment, running every day of the year and providing a reliable stream of economic activity for the community.

### Advancing equity through procurement

A Contract Equity Program that expands opportunities for small, local, and diverse businesses to compete for and win EBMUD work.

### Supporting quality jobs and career pathways

A workforce of more than 2,000, and the apprenticeship and workforce development programs that open those careers to the next generation.

### Protecting the environment and the Bay

Watershed protection, recycled water, pollution prevention, and climate resilience that safeguard public health and generate lasting community value.

## Scale of the work

|                                     |                                                         |                        |                                                              |                                                            |                                                         |
|-------------------------------------|---------------------------------------------------------|------------------------|--------------------------------------------------------------|------------------------------------------------------------|---------------------------------------------------------|
| <b>PEOPLE AND COMMUNITIES</b>       | <b>1.5 million</b> water customers                      | <b>2,032</b> employees | <b>140 million</b> gallons of drinking water delivered daily | <b>SYSTEM AND STEWARDSHIP</b>                              | <b>4,200 miles</b> of pipeline                          |
| <b>740,000</b> wastewater customers | <b>20 cities + 26</b> unincorporated communities served | <b>DAILY SERVICE</b>   | <b>50 million</b> gallons of wastewater treated daily        | <b>9 million+</b> gallons of recycled water supplied daily | <b>57,000 acres</b> of protected watershed land managed |

# The Economic Return

## An essential service with a regional return

From FY 2023 through FY 2025, our capital investments and daily operations generated \$4.8 billion in regional economic output across Alameda and Contra Costa counties.

That activity supported jobs at EBMUD, among contractors and suppliers, and at neighborhood businesses where workers spend their earnings.

### EBMUD's economic contribution at a glance

**\$4.8B**

**Cumulative regional economic output**  
FY 2023-2025, including

**\$3.2B**

**Contribution to East Bay GDP**  
FY 2023-2025

**6,300**

**Average annual jobs supported**  
At EBMUD, suppliers, contractors, and  
community businesses

**\$754M**

**Average annual labor income**  
Wages, benefits, and self-employment income  
reaching households

**\$251M**

**Annual average tax revenue generated**  
Local, county, state, and federal revenue from  
EBMUD-supported activity

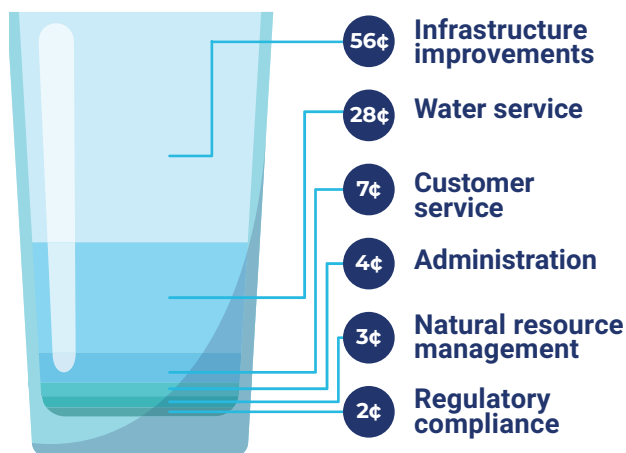
**EBMUD is a sustained source of jobs, business opportunity, and public investment across the East Bay. We keep a critical public system operating while supporting household income, local businesses, and public revenue.**

Note: All economic results are expressed in 2026 dollars. Jobs supported counts annual-average positions across the regional economy: at EBMUD, among contractors and suppliers, and at community businesses, not EBMUD headcount. Full-time, part-time, and seasonal positions each count as one job.

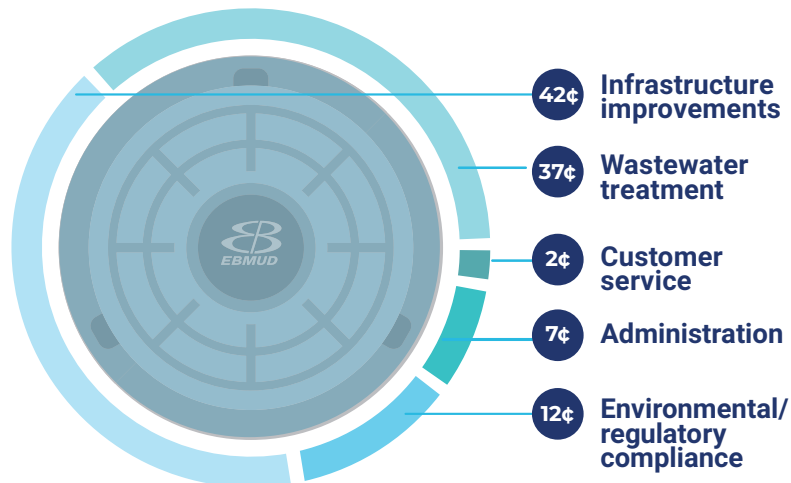
# Your Rate Dollars at Work

Every customer bill helps fund the water and wastewater services people rely on, the infrastructure that keeps those services reliable, and the environmental stewardship that protects source water and San Francisco Bay.

## Each \$1 of your water rate goes to:



## Each \$1 of your wastewater rate goes to:



**\$1 spent → \$1.50 in regional economic activity**

## How Your Rate Dollars Circulate

Those dollars don't stop at the water system. Once spent, they move through the East Bay economy, creating a ripple effect. Think of it like dropping a stone in a reservoir: the first splash is the effect of our own spending, and each ripple is another round of local economic activity. By the time the ripples settle, every dollar we spend has circulated as about \$1.50 in total economic activity across East Bay businesses.



### DIRECT

The effect of our initial spending as it enters the East Bay economy through payroll and benefits, purchases of goods and services, and investment in construction projects.

### INDIRECT

The effect that occurs when vendors and contractors purchase from their own suppliers in order to fulfill our orders, generating business-to-business activity throughout the supply chain.

### INDUCED

The effect that occurs when our employees and workers throughout the supply chain spend their earnings locally. The cycle continues as workers at those community businesses spend their own wages nearby.

Note: Total output includes intermediate transactions counted at more than one stage of the supply chain and is therefore larger than the region's underlying economic production.

# Two Engines, One System

EBMUD's economic contribution is powered by two connected engines. Capital investment renews the infrastructure the East Bay will depend on for decades. Daily operations keep water flowing, wastewater treated, and public health and the environment protected every day of the year.

## The infrastructure engine

Building for tomorrow

**\$2.69B** cumulative regional output supported by capital investments over FY 2023-2025

Replacing aging pipelines, upgrading treatment plants, improving seismic resilience, and modernizing facilities.



## The operations engine

Delivering every day

**\$2.12B** cumulative regional output supported by daily operations over FY 2023-2025

Treating and delivering drinking water, managing wastewater, maintaining equipment, protecting watershed lands, and serving customers.

| What that looked like in FY 2025 | Infrastructure investments | Daily operations |
|----------------------------------|----------------------------|------------------|
| REGIONAL ECONOMIC OUTPUT         | \$916M                     | \$738M           |
| JOBS SUPPORTED                   | 3,727                      | 2,868            |
| LABOR INCOME                     | \$433M                     | \$350M           |

Figures are rounded individually and may not sum exactly.

# Careers That Strengthen Communities

More than 2,000 EBMUD employees operate and maintain the water and wastewater systems that East Bay residents depend on, and about three out of four live in the communities they serve. Their work spans skilled trades, operations, engineering, environmental science, customer service, finance, information technology, and public affairs.

Our workforce development strategy creates pathways into those careers, connecting students, job seekers, community partners, and employees to opportunity.

## From interest to career

- G** **Generate interest**  
Introduce people to careers in water and wastewater
- U** **Unlock untapped talent**  
Cultivate partnerships with community organizations and educational institutions
- L** **Link people to resources**  
Prepare job seekers to enter the labor market and compete for employment with us
- F** **Foster community connections**  
Expand outreach and develop a pipeline of diverse, qualified applicants

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"At EBMUD, investing in our people is how we deliver on our promise to the East Bay. A water system is only as resilient as the workforce behind it."

— Derry Moten, Special Assistant to the General Manager

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Diane Starr came to EBMUD through Laney College, a job fair, and an internship, then into the District's apprenticeship program. Today she's a journey-level maintenance machinist at the Adeline Maintenance Center, repairing the tools and equipment field crews depend on.

## Workforce opportunity at a glance

**40+**

Specialized job fairs and expos each year

**7.16%**

Hiring rate for individuals with disabilities, exceeding the 7.0% federal benchmark

**5.02%**

Hiring rate for protected veterans, exceeding the 3.20% benchmark

**15**

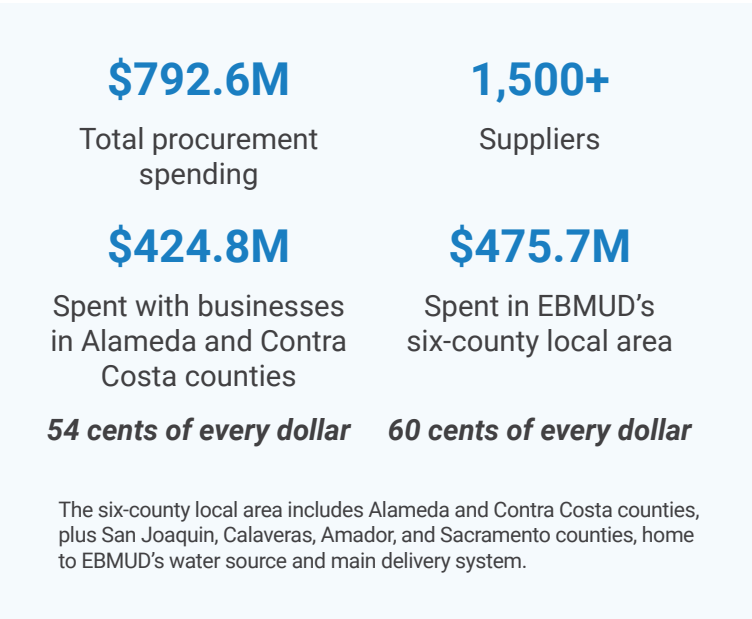
Interns hired into District positions over FY 2023-2025

# Keeping Opportunity Local

## Procurement that builds local business and local livelihoods

The way we spend ratepayer dollars shapes not only the water system, but also the economic opportunities created throughout the East Bay. We adopted our first supplier diversity policy in 1984 and formalized it as the Contract Equity Program in 1998. Later expansions added disabled-veteran-owned businesses in 2015 and local-hire commitments in 2019. Together with those commitments, the program works to expand access to public contracting and help keep more economic value in the communities we serve.

### Contract Equity Program results (FY 2023-2025)



**"Every contract is somebody's chance, and somebody else's first call when the next opportunity comes."**

— Beverly Johnson, Contract Equity Administrator, 39 years with the District

### Local Hire Program results (FY 2024)



# Public value beyond the economic numbers

Our contribution is also reflected in the support available to our customers and the stewardship that protects water from its source to San Francisco Bay.



▲ 35,000+ Chinook salmon returned to the Mokelumne River in the 2024–25 fall run.

## Keeping service within reach

For some households, even a fair water bill can be difficult to manage. EBMUD's Customer Assistance Program helps income-qualified customers maintain access to essential water and wastewater service. Eligible single-family residential customers receive an 80% discount on water charges and a 35% discount on wastewater charges. CAP is funded through non-rate revenue.

**13,200**

Households served in 2025

**\$4.6M**

In credits delivered

**66%**

Enrollment growth since 2019

## Stewardship from source to Bay

The water we deliver begins in the Mokelumne River watershed and returns to San Francisco Bay after treatment. At every stage, stewardship protects water quality, stretches supplies, and lowers the environmental footprint of the system. From watershed to Bay, our investments protect public health, strengthen resilience, and help keep service reliable for the communities we serve.



### At the source

**57,000 acres** of protected watershed land help safeguard water quality before it reaches a treatment plant. Land management, wildfire-risk reduction, habitat restoration, and hatchery operations support a healthier river system.



### Along the way

Recycled water and conservation reduce demand on limited drinking-water supplies. We supply more than **9 million gallons of recycled water daily** and have achieved an estimated **28 million gallons per day** in lasting conservation savings since 1995.



### At the Bay

Treatment upgrades and source-control efforts have reduced heavy metals in Bay discharge by approximately **98% since 1977**. Biogas recovery also generates more than **55,000 MWh** of renewable electricity each year.

# Impact Where You Live

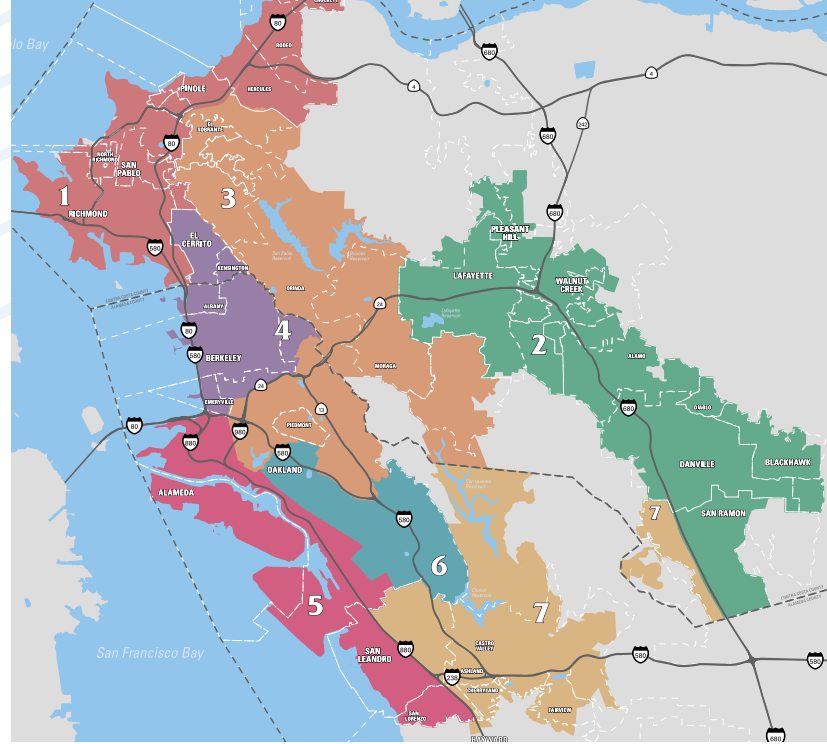
Rate dollars fund work in every part of our service area. Here is what that looks like ward by ward.

## **WARD 1** *Crockett, Hercules, Rodeo, San Pablo, North Richmond, Selby, and parts of Richmond and Pinole*

In March 2024, we completed replacement of the original 5.4-million-gallon San Pablo Clearwell with two new 3.5-million-gallon concrete tanks. Together with prior seismic upgrades at San Pablo Dam, the work increases storage capacity and strengthens a treatment plant that can be called into service during peak demand or emergencies.

## **WARD 2** *Alamo, Danville, Lafayette, Walnut Creek, Blackhawk, Diablo, and parts of Pleasant Hill and San Ramon*

Construction began in March 2026 on a \$14 million seismic upgrade to the Lafayette Reservoir's outlet tower, required by the California Division of Safety of Dams. We are also upgrading the reservoir's aging wastewater collection system and advancing a maintenance and reliability program at the Lafayette Water Treatment Plant scheduled through 2031.



## **WARD 3** *Orinda, Moraga, Piedmont, El Sobrante, and parts of Oakland, Pinole, and Richmond*

Construction is more than halfway complete on the \$341 million Orinda Water Treatment Plant upgrade, adding ultraviolet disinfection and a new chlorine contact basin to a facility built in the 1930s that serves approximately 800,000 customers, with completion on track for 2027. In May 2024, the 4.6-megawatt Orinda Photovoltaic Solar Energy Project came online—EBMUD's largest solar installation, projected to save ratepayers \$26 million in electricity costs over 25 years.

## **WARD 4** *Albany, Berkeley, Emeryville, El Cerrito, Kensington, and part of Oakland*

Ward 4 sits directly above the Hayward Fault, making earthquake resilience central to infrastructure investment here. The active Wildcat Pipeline project is installing 2.6 miles of 36-inch transmission pipeline along Richmond Street in El Cerrito. In August 2025, we extended our partnership with UC Berkeley's Center for Smart Infrastructure with a \$2.8 million agreement funding 10 research projects on seismic monitoring, pipeline crack detection, and earthen dam inspection.



**WARD 5** *Alameda, and parts of Oakland, San Leandro, and San Lorenzo*

Ward 5 is home to our Main Wastewater Treatment Plant, where biogas captured during treatment generates more electricity than the plant consumes, making it a net energy exporter and a nationally recognized model for sustainable utility operations. The 2023 completion of the Oakland Inner Harbor Crossing brought 3,000 feet of earthquake-resistant pipeline beneath the Oakland Estuary, replacing 1940s-era cast iron pipe.

**WARD 6** *East Oakland and the area south of Park Blvd/5th Avenue to the San Leandro boundary*

Pipeline replacement is underway on East 29th Street, Excelsior Avenue, and Oceanview Drive, alongside rehabilitation of Pump Station H—a 70-year-old wastewater facility serving Oakland’s entire south interceptor—and the large-diameter sewer pipeline at the Oakland Coliseum. The Upper San Leandro Water Treatment Plant, built in 1927, is being modernized to improve seismic safety, water quality, and drought resilience, with completion targeted for Summer 2028.



**WARD 7** *Castro Valley, Cherryland, Fairview, and parts of San Lorenzo, San Leandro, Hayward, and San Ramon*

Aging infrastructure, groundwater sustainability, and water supply diversification shape long-term priorities across Ward 7. Active pipeline replacement and construction of new regulator facilities in Castro Valley are advancing system reliability, while the Miller Road site provides soil management logistics that keep the regional pipeline rebuild program on schedule.

**BEYOND THE WARDS** *Upcountry*

Some of the work that serves these wards happens well outside them. About 90% of the water we deliver begins more than 100 miles away in the Sierra foothills, where the Pardee and Camanche Reservoirs capture flows from the Mokelumne River. Our teams there run a 24-hour operation storing water, operating dams and hydropower facilities, and coordinating river flows with state and federal partners while supporting flood control and downstream fisheries.

Planned investments include a more than \$46 million project to install a new lime system at the Valley Spring plant and relining of the Mokelumne Aqueduct. These facilities also anchor a recreation economy around Valley Springs, Lodi, and the Lower Mokelumne corridor, and EBMUD’s local-hire commitments extend to San Joaquin, Calaveras, Amador, and Sacramento counties.



# Looking ahead

## Investing in the systems the East Bay will rely on

From FY 2023 to FY 2025, EBMUD's regional economic output grew from \$1.53 billion to \$1.65 billion after adjusting for inflation. As we advance our 10-year Capital Improvement Program, continued investment will support essential infrastructure, regional jobs, and a resilient water future.

## A decade of planned investment

**\$6.8B**

Total 10-year  
Capital Improvement  
Program

**\$5.6B**

Planned  
water-system  
investments

**\$1.2B**

Planned  
wastewater-system  
investments

**\$1.9 billion**

of that water-system  
investment funds  
the Pipeline Rebuild  
Program, replacing  
nearly 300 miles of pipe  
over the next decade.

## What the next decade makes possible

### Reliable service

Replacing and modernizing the pipelines, treatment facilities, reservoirs, and pumping systems the East Bay depends on.

### Regional opportunity

Sustaining demand for construction, engineering, environmental, equipment, and skilled-trades work.

### Long-term resilience

Preparing the system for aging infrastructure, seismic risk, evolving regulations, and a changing climate.

## Board of Directors

EBMUD is a not-for-profit public utility governed by a seven-member Board of Directors, elected by ward and accountable to the people we serve.



**WARD 1**  
Joey D. Smith



**WARD 5**  
Jim Oddie



**WARD 2**  
Luz Gómez  
*President*



**WARD 6**  
Valerie D. Lewis



**WARD 3**  
Marguerite Young



**WARD 7**  
April Chan



**WARD 4**  
Andy Katz



**Clifford C. Chan**  
*General Manager*

## Read the full report

This summary draws on EBMUD's 2026 Economic Impact Report. The complete report includes detailed financial tables, ward-by-ward project information, procurement analysis, and full methodology.

This analysis was conducted by Laisar Management Group using IMPLAN, an input-output modeling system, applying the 2024 IMPLAN regional model for Alameda and Contra Costa counties. Inputs are drawn from EBMUD's audited Annual Comprehensive Financial Reports for FY 2023–2025. All results are expressed in 2026 dollars. Jobs are annual-average positions, counting full-time, part-time, and seasonal work each as one job. Total output includes intermediate transactions and is therefore larger than the region's underlying economic production. Full methodology and limitations appear in the complete report.

For hard copies of the full report or this summary for general distribution, contact the Contract Equity Office at [contract.equity@ebmud.com](mailto:contract.equity@ebmud.com) or (510) 287-0114.



East Bay  
Municipal Utility District

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